Contents - [F7] Schedule

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7. [F7] Schedule

Introduction

There are two folders available from **[F7] Schedule:**

- **Schedule:** Used to view a three-month schedule of routed calls for a **particular Sales Rep.**
- **Router:** Used to quickly create and modify call routes.

About Schedule Folder

The **Schedule** folder is used to view a three-month schedule of routed calls for a **particular Sales Rep.** (The format of this screen is similar to the **Schedule** folder available in **[F4] Work Request** which displays a three-month schedule for a **particular account.**)

The schedule is based on information that was entered into **Router**. From the schedule, you may double-click on a day to view the accounts the rep is scheduled for on that day.

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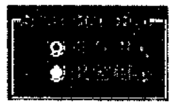
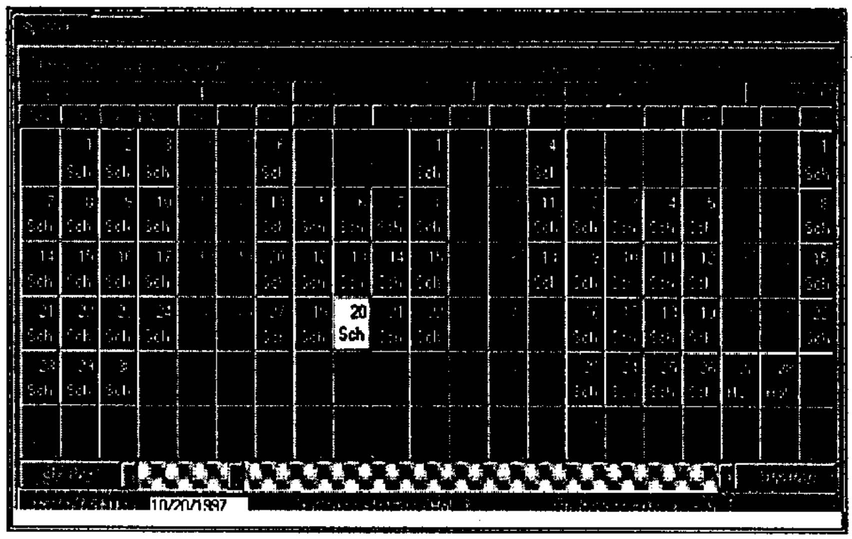
Viewing the Schedule

IMPORTANT! **You need to specify whether you are viewing schedules for a Retail Rep or a Sales Rep *before* you access [F7] Schedule.**

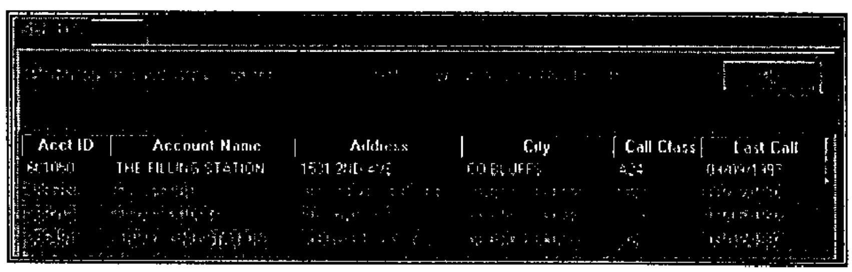
Before accessing **[F7] Schedule**, press **[F12]** to display the **Account List** and select Sales Rep or Retail Rep.



1. Click the **[F7] Schedule** button, or press [[F7]]. The **Schedule** folder is displayed. If you wish to select a different rep, activate the **[F12] Account List** and click on the Router folder to make a selection.



2. Double-click on a date to view the accounts that the selected rep is scheduled for on that date. A list of accounts is displayed. Information provided for each account includes account ID, name, address, call class and last call date. To return to the regular schedule, click **OK**.



3. Following is some additional information about the schedule:
   - The total number of accounts scheduled in the time period selected is indicated at the top right of the folder.
   - You can use the arrow buttons at the bottom of the schedule to scroll forward and backward in the calendar.

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- The schedule is color-coded to indicate the following:

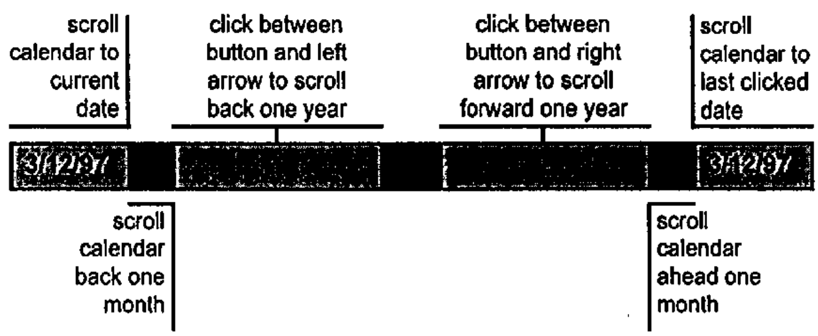
Color/Code	What it Means
Hol	Red: Company holiday
Sch	Blue: Selected rep scheduled in call
	White: Currently selected date

Navigating in the Schedule

Initially, the schedule displays the current month plus the next two months. To view previous/future months, use the buttons at the bottom of the calendar:

- click right arrow to scroll forward one month
- click left arrow to scroll backward one month
- click between button and right arrow to scroll forward one year
- click between button and left arrow to scroll backward one year
- click the right date button to go to the last date that was clicked on the Schedule
- click the left date button to go to the current date

All of the calendars used in Account Management are similar to this one!



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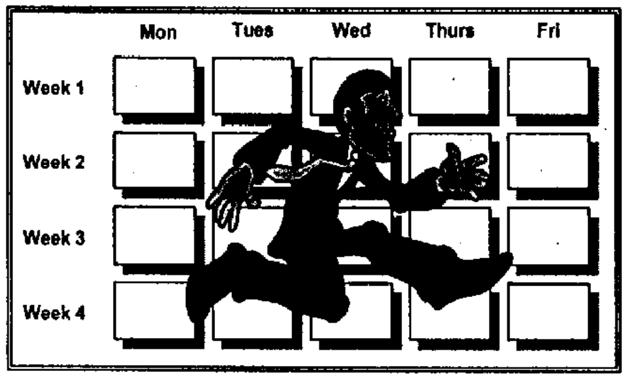
What is Call Router?

Call Router allows you to quickly create and modify call routes. It is normally used by:

- **Sales Reps**: To view the routes of Retail Reps in their territory.
- **Retail Managers**: To create call routes for Retail Reps.
- **Division Managers**: To view call routes for Sales Reps and Retail Reps.

To create a call route, all you have to do is specify which territory you wish to route, then "click, drag and drop" each account onto a four-week, five-day routing grid.



Once the route is complete, it is sent to the mainframe the next time you perform a Full Download/Communications. After communications, a three-month calendar of routed calls can be viewed in the Call Reporting **Work Request** and **Schedule** functions.

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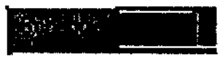
Accessing Call Router

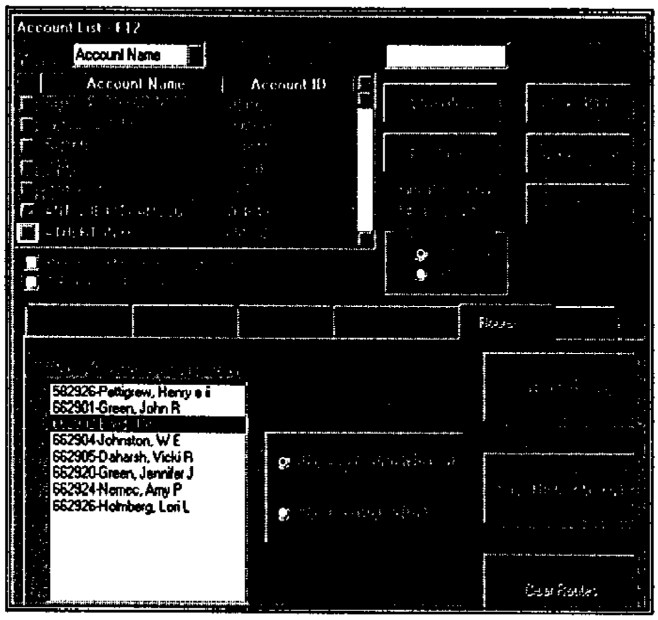
IMPORTANT! **You need to specify whether you are creating/modifying call routes for a Retail Rep or a Sales Rep *before* you access [F7] Schedule.**

Before accessing **[F7] Schedule**, press **[F12]** to display the **Account List** and select Sales Rep or Retail Rep.

1. Click on **[F7] Schedule** and select the **Router** folder.



2. Press **[F12]** to access the account list. Choose **Search View** to display the entire account list. Select the **Router** folder from the Account List window.



3. A list of the territories you have access to is displayed. The territories are displayed in number sequence. Note the following:
   - **Sales Reps**: You will be able to *view* the routes of Retail Reps in your territory.
   - **DMs/RMs**: You will be able to *update* the routes of any Retail Reps or Sales Reps in your division.
4. Highlight the territory you wish to route. Apply any additional sort or search criteria to the **[F12] Account List**, such as sorting the list by City

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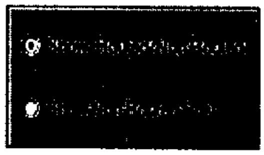
5. Click on the **Show Routed/Non Routed** radio button to display both routed and non-routed accounts in the account list. Click on the **Show Non Routed Only** radio button to display only non-routed accounts in the account list.

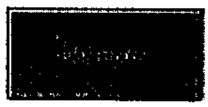


6. If the selected territory has been previously routed, accounts appear on the routing grid. Otherwise the routing grid is blank. To the selected territory, you can now:

   - clear all previously routed calls
   - route new calls
   - save or cancel the new route

7. If you wish to clear all previously routed accounts from the routing grid:

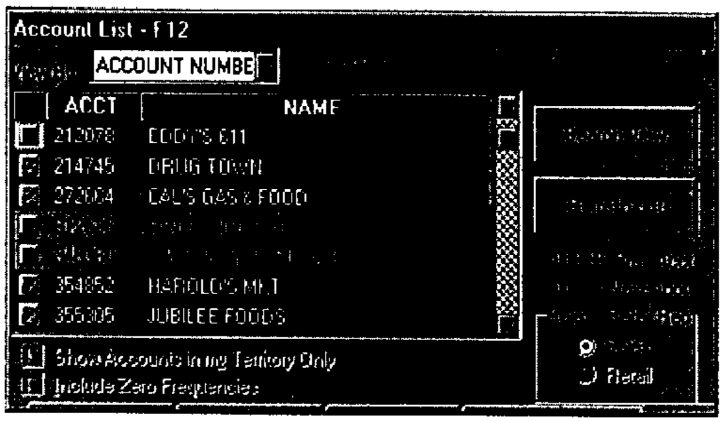
   - click the **Clear Routes** button at the bottom of the **[F12] Account List Router** folder.



   - If you exit the Router folder without adding further calls, you must click on the **Save Router Changes** button to save the cleared route.

8. To route calls:

   - Click **View Account List** to return the Account List window to its normal size.
   - click on the checkbox beside the call(s) in the Account List that should be routed for a certain day. A checkmark will appear beside the selected accounts. To select non-contiguous accounts, click to make selections.



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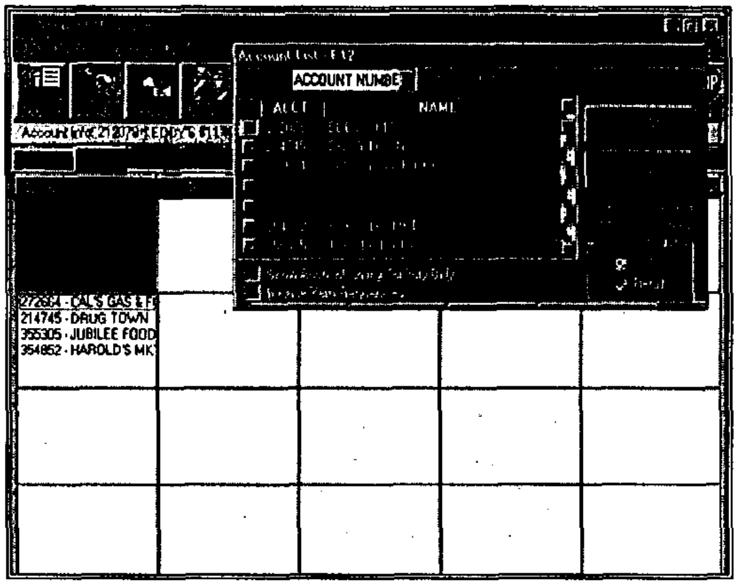
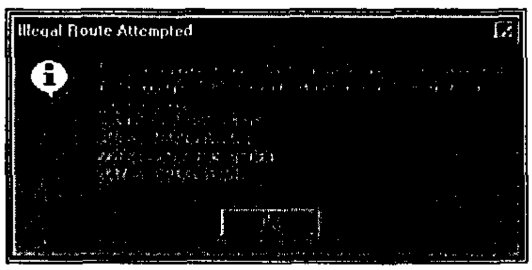
- Once you have made the selections from the account list, drag and drop the selections to the appropriate date on the routing grid.



- Continue this process until all calls are routed.

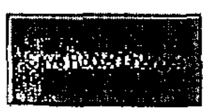
  NOTE: You cannot route the same call in the same week. If you attempt to do so, you will receive an error message.



- select the **Search View** button again on the **[F12] Account List** to display router options.

9. To save or cancel your routed calls:

- click the **Save Router Changes** button at the bottom of the **[F12] Account List Router** folder.



—or—

- click the **Cancel Router Changes** button at the bottom of the **[F12] Account List Router** folder.

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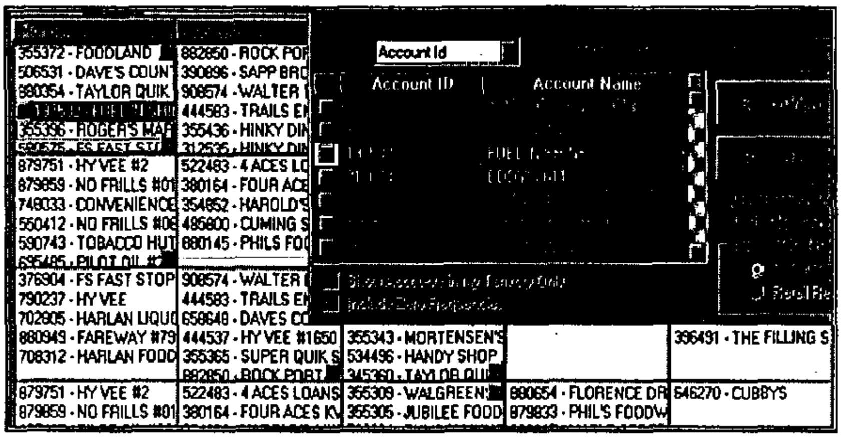
Navigating in Router

Below are some basics for navigating in router.

Red Box

When you highlight an account in the **[F12] Account List** and that account is scheduled on the grid, a red box is displayed beside the account everywhere it appears in the grid.



Scheduling Reps in a call

If you are viewing schedules for *Sales Reps* and highlight an account in the **[F12] Account List**:

- a **red** box appears beside that account in the grid when a *Sales Rep* is scheduled in that call
- a **yellow** bar appears on the right side of a square in the grid if a *Retail Rep* is scheduled in that call

If you are viewing schedules for *Retail Reps* and highlight an account in the **[F12] Account List**:

- a **red** box appears beside the account in the grid when a *Retail Rep* is scheduled in that call
- a **blue** bar appears on the right side of a square in the grid if a *Retail Rep* is scheduled in that call

Accessing [F12] Account List

If you are viewing the routing grid and select an account in the **[F12] Account List**, click on the **[F2] Account Info** button to obtain more information about the account.

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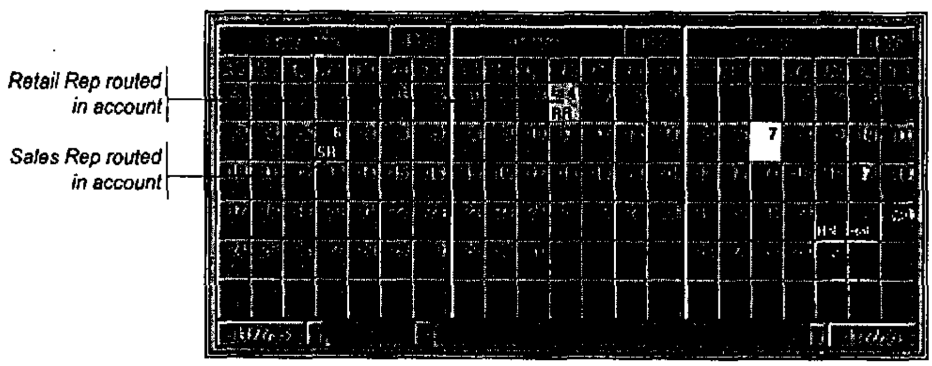
Routing Calls

Guidelines

The following table indicates how often each type of call should be routed.

Type of Call	Frequency	Route this call . . .
annual	1	Once per route. (The call will be placed on the schedule approximately 52 weeks from the last call date, on the day/cycle week specified.)
quarterly	4	Once per route. (The call will be placed on the schedule approximately 13 weeks from last the call date, on the day/cycle week specified.)
monthly	12	Once per route.
biweekly	24	Two cycle weeks per route (weeks 1&3 or 2&4). The call does not have to be routed on the same day in both weeks.
weekly	52	Once per cycle week. The call does not have to be routed on the same day each week.
	0	Do not route zero-frequency calls.

You can view the results of the routing process in Call Reporting. Use the **F4 Work Request** "Schedule" *folder* to view calls scheduled for an account; use the **[F7] Schedule** *function* to view calls scheduled for a particular rep. The route will appear as a three-month calendar similar to the following:



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Moving a Call to a Different Day/Week

To move a single call:

1. In the routing grid, click on the account you wish to move.
2. Without releasing the click button, drag the account to the desired day and drop it on the routing grid.

To move multiple calls:

1. Press and hold the **[Shift]** key. In the routing grid, click on the accounts you wish to move.
2. When the desired accounts have been selected, click on one of the selected accounts.
3. Without releasing the click button, drag the accounts to the desired day and drop them.

Copying a Call to a Different Day/Week

To copy a single call:

1. Press and hold the **[Ctrl]** key. In the routing grid, click on the account you wish to copy.
2. Without releasing the click button, drag the account to thedesired day and drop it. The account should appear on the day it was copied*from* and *to*.

To copy multiple calls:

1. Press and hold the **[Shift]** key. In the routing grid, click on the accounts you wish to copy.
2. When the desired accounts have been selected, press **[Shift]+[Ctrl]**, then click on one of the selected accounts.
3. Without releasing the click button, drag the accounts to the desired day and drop them. The accounts should appear on the day they were copied*from* and *to*.

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Expanding a Cell

1. Click on the cell you wish to expand so that it is highlighted.
2. Press the right click button. The cell is expanded so that you can view the entire account name, call class, route code, and volume.

Account Number/Name	Day/Cycle Week	Call Class	SIS Route	SIS Ind Volume
906164 - 7-11 #15375 (J)	Thursday,Cycle Week 2	A12	000	197
602138 - 7-11 #20486 (J)	Thursday,Cycle Week 2	A12	000	172
151328 - 7-11 #24843 (J)	Thursday,Cycle Week 2	A12	000	154
601983 - 7-11 #30456 (J)	Thursday,Cycle Week 2	A12	000	125
151319 - CONOCO #43065	Thursday,Cycle Week 2	A12	000	95
381378 - CHEVRON 1645	Thursday,Cycle Week 2	A12	000	115
696663 - WINN DIXIE #2444	Thursday,Cycle Week 2	A12	000	56
906350 - 7-11 #20301 (J)	Thursday,Cycle Week 2	A12	000	109

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